



Arizona State Retirement System

3300 North Central Avenue, Phoenix, AZ 85012
WWW.AZASRS.GOV

Employer Information Sheet

Contact information: Employer Relations

Phoenix (602) 240-2022, 240-2147, 240-2093
Tucson (520) 239-3100 ext 2022, 2147, 2093
Toll-free (800) 621-3778 ext 2002, 2147, 2093

NOTIFICATION FOR SURVIVOR BENEFITS

If an ASRS member dies, please have someone notify the ASRS so that the process to pay out any survivor benefits may begin.

The person notifying the ASRS may be a family member, friend, employer, or personal representative. The report of the death may be made by phone, in person or through correspondence. The person reporting the death will need to communicate with the ASRS the member's Social Security number, the date of death, and provide their contact information, such as a mailing address and telephone number in the event additional information is needed.

Prior to mailing the survivor benefits packet, the ASRS will request court documents for a trust, estate, conservatorship or a guardian letter if applicable. Upon receipt of the requested documents, the ASRS will complete the review of the member's account and mail a survivor benefits packet to the beneficiary(ies). The survivor benefits packet will indicate the eligible benefits for the recipient(s) and the required documentation needed to process the benefit. If the beneficiary qualifies for an annuity, the election must be made within one year from the date of death.

The following documents are required and must be received by the ASRS before distribution of payments can be made:

- A certified copy of the member's death certificate.
- A copy of the beneficiary's Social Security card. If unavailable, a copy of a W-2, a passport with the SSN on it or a paycheck stub is sufficient. (The ASRS will not accept a copy of the driver's license or income tax returns).
- A notarized ASRS application to claim survivor benefits.
- Reimbursement of any overpayments.
- If the beneficiary is an estate or trust, a copy of the court appointed personal representative, a copy of the trust and a completed W-9 form.

To report a death, or if you have questions, please contact the ASRS Member Advisory Center by email at askmac@azasrs.gov or by phone at (602) 240-2000 in Phoenix, (520) 239-3100 in Tucson, or toll-free at (800) 621-3778 outside metro Phoenix or Tucson.

This fact sheet does not replace statutory and rule requirements. Arizona Revised Statutes, the Arizona Administrative Code along with the federal code for both the IRS and Social Security Title 218, shall be final authority